King County
METRO

King County Metro Transit

2016 Rider Survey Executive Summary

March 2017

Research conducted for:

King County
Department of Transportation
Metro Transit Division

By:

EMC Research, Inc.

Table of Contents

Methodology

- Long-term tracking study that measures rider satisfaction with various aspects of Metro's bus service to help King County Metro better understand where to focus its service improvement efforts to increase rider satisfaction over time.
- Live telephone survey of residents age 16 and older in King County, Washington.
- The survey was conducted December 1st – 30th, 2016
- 800 total respondents; Margin of Error: ± 3.5 percentage points
- Interviews were stratified across three regional subgroups Seattle/North King (401n), South King (199n) and East King (200n) County.
- Responses were weighted by key demographics to reflect the most recent census counts for residential households in King County.
- In keeping consistent with the study's approach in previous years, EMC conducted a telephone survey using a Random Digit Dial (RDD) and listed cell phone samples, supplemented with targeted <$35K income, Hispanic and Asian samples.
- Interviews conducted using trained, professional interviewers.

Please note that due to rounding, some percentages may not add up to exactly 100%.

Key Findings

MARKETSHARE

- The portion of King County households with regular bus riders (ride 5+ times/month) has dropped over the last couple of years (35% regular riders in 2014→26% in 2016) and is on-par with 2011 levels (26%).
  - This decline is primarily driven by a lower incidence of regular bus riders in Seattle/North (54% in 2015→41% in 2016).
  - The household shares of regular bus riders in South King and East King are both unchanged from 2015, though both are lower than in 2013-2014.

FARE PAYMENT

- About three quarters of riders say they use an ORCA card (purchased themselves or by employers) as their primary method of bus fare payment.
  - When including U-Pass/Husky Card usage, nearly four-in-five riders (79%) use some type of ORCA card.
  - One fifth (21%) use cash or tickets as a primary fare payment method.

Key Findings

OVERALL SATISFACTION WITH METRO

- Riders' satisfaction with King County Metro continues to edge upward from previous years.
  - Nearly half (49%) of riders are "very satisfied" with the agency and another two-fifths (44%) are "somewhat satisfied" with very little dissatisfaction, overall.
  - Riders continue to be highly favorable of most aspects relating to fare payment and bus operator satisfaction.
  - Satisfaction with information-related element is lower than in previous years.
  - Level of Service satisfaction (including on-time performance, travel time, service frequency and availability), while also lower than 2015, has returned to 2014 levels.
  - All service elements have net favorability ratings, meaning far more riders were satisfied with those elements than dissatisfied.

INDIVIDUAL ELEMENT SATISFACTION CHANGES

- While satisfaction intensity has dropped for several individual elements compared to 2015, the broader satisfaction levels for most items (including "very" and "somewhat satisfied") was statistically unchanged for a majority of attributes.
  - Some individual satisfaction attributes saw declines in satisfaction from 2015 to 2016, including website service delay postings (-16% "satisfied"), the availability of information on Metro's website (-10%), info via smartphones (-10%), and ease of boarding/exiting due to overcrowding (-9%). Additionally, service element ratings for the availability of service (-7%), frequency of service (-6%), and on-time performance (-5%) also declined between 2015 and 2016.

Key Findings

AGGREGATED SERVICE DIMENSIONS

- 34 individual service elements were rated in the 2016 Rider survey. These individual elements were categorized into broader service dimensions, including **Comfort and Cleanliness**, **Fare Payment**, **Information**, **Level of Service**, **Operators**, **Personal Safety** and **Transfers**.
  - Of these dimensions, **Level of Service**, **Information Sources**, and **Transfers** are general priorities for improvement. These categories are relatively lower rated but are also important drivers of overall satisfaction with Metro. Short-term efforts should prioritize improving these general areas but there are several specific elements in other categories that also deserve attention.
  - As another key area of focus, **Personal Safety** is an important maintenance priority. Safety element ratings are generally highly rated but Metro should continue to focus efforts on maintaining satisfaction with these attributes to prevent them from driving down agency satisfaction in the future.
  - The **Comfort and Cleanliness** dimension has the lowest bearing on overall satisfaction of the broader service dimensions but it's also the lowest performing. Some of the elements in this service dimension can be considered improvement priorities, including the ease of getting on/off crowded vehicles and the availability of seating at stops. On-board cleanliness is a key maintenance target, as well.
  - Metro **Operators** and **Fare Payment** are currently the agency's highest rated service dimensions but are largely performing adequately for their relative importance levels. It will be worth tracking satisfaction for these attributes in the future but major improvement efforts are not required for these elements in the near-term.

Key Findings

INDIVIDUAL SERVICE ELEMENTS

- There are several individual service elements which should be targeted for improvement as they heavily influence overall satisfaction with Metro but are currently underperforming relative to their importance. These elements span a variety of different service dimensions and include:
  - **Ability to provide feedback** (the Information service dimension)
  - **Frequency of service** (Level of Service)
  - **Transfer wait times** (Transferring)
  - **Number of transfers** (Transferring)
  - **Ease of getting on/off crowded buses** (Comfort & Cleanliness)
  - **On-time performance** (Level of Service)
  - **Safety of stops after dark** (Personal Safety)
  - **Availability of seating at stops** (Comfort & Cleanliness)

- Additional maintenance and strategic target items could be considered borderline improvement priorities, including **travel time** (Level of Service), **availability of service** (Level of Service), **interior cleanliness** (Comfort & Cleanliness) and **the availability of information online** (Information).

Key Findings

INDIVIDUAL SERVICE ELEMENTS

- Among the information-related elements, the **ability for riders to provide feedback such as registering a complaint, commendation, or input for service changes** is one of riders' biggest priorities for improvement. This is both the most important and lowest-rated element among the information-related items. It also poses potential spill-over opportunities for improving a variety of other service attributes as a more accessible feedback system could help Metro more easily identify other potential issues throughout the system and address them as they arise.

- **On-time performance** is a key improvement target and one of the most important level of service elements. Reducing delays and improved schedule consistency may offer one of the highest rate of return (in overall agency satisfaction) for the resources required relative to other Level of Service items.

- **Frequency of service** is one of the top improvement priorities in the survey and could yield some of the highest returns for overall satisfaction if Metro is able devote additional resources towards improving it. Given this element's reliance on additional funding, it may be less practical than other potential improvement opportunities to address in the short term. Nevertheless, the service frequency element remains a key priority for riders going forward.

- Of the personal safety elements**, night-time stop safety** is the key improvement area for Metro to focus on in the near-term. Stops and stations in South King may require particular attention, where one-in-ten riders in this geographic sub-area are "very dissatisfied" with their safety waiting for buses.

Key Findings

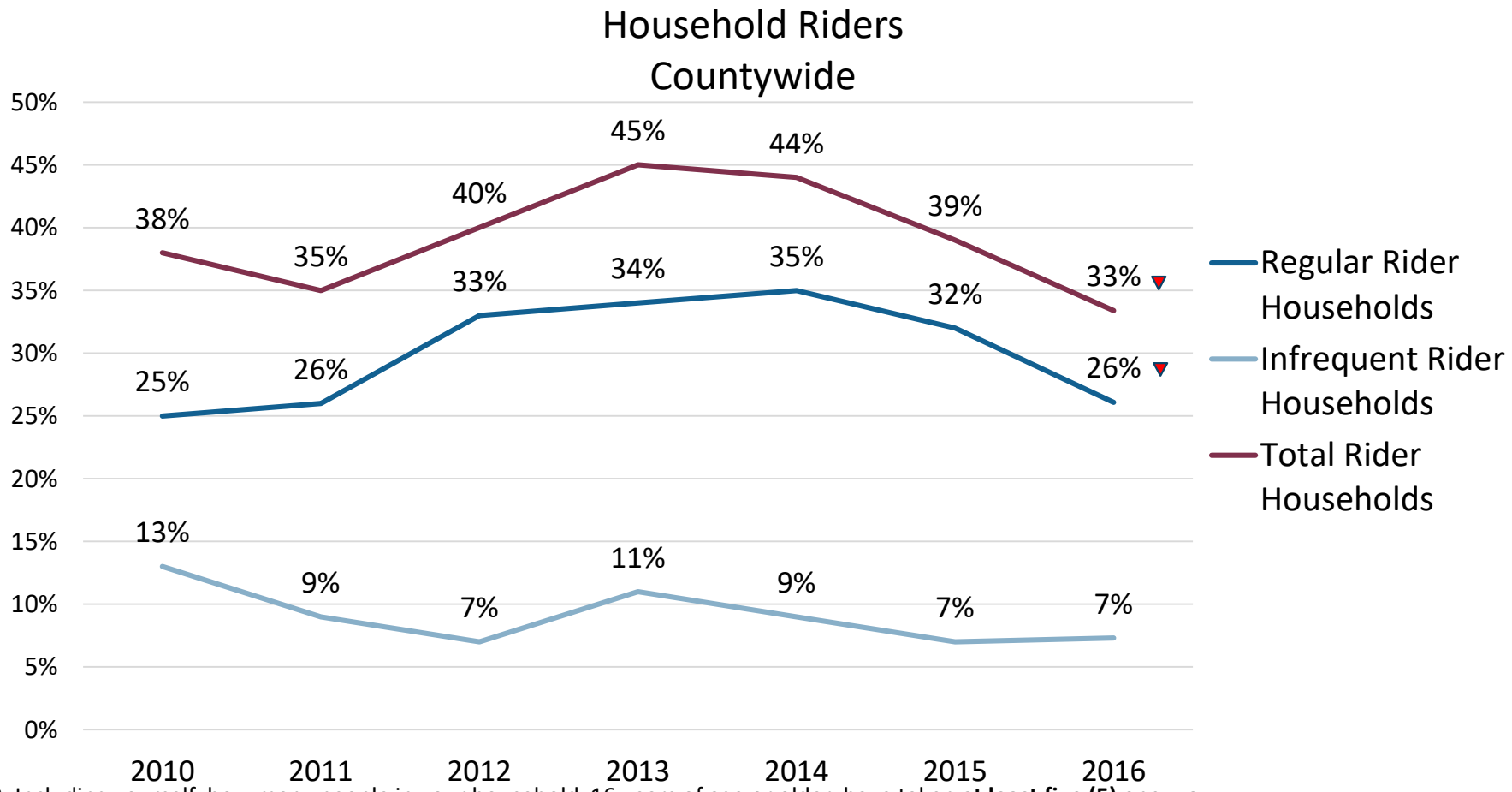
INDIVIDUAL SERVICE ELEMENTS

- Although the **availability of information online**, the **availability of info at stops** and **online delay postings** are not strictly improvement priorities, they are relatively low-rated and could easily be considered borderline areas to focus on in the near-term.
- Both of the transfer satisfaction elements tested – including the **number of transfers** and the **wait time while transferring** -- were relatively low-rated but also very important, making these key improvement priorities. While these likely pose ongoing scheduling challenges in light of regular service changes for Metro, Sound Transit and other regionally-connected services, riders consider transfers very important aspects of their overall satisfaction with Metro.
- The **ease of getting on and off crowded vehicles** and – to a lesser extent – the **availability of seating at stops and shelters** are potentially high-focus areas for improvement. Additionally, improving the **interior cleanliness of buses** could also be considered a borderline improvement area, particularly for riders in South King where satisfaction is a bit lower for this element.
- Of the comfort and cleanliness elements, **interior cleanliness** may be the easiest to address without significant funding or structural changes to the system. Riders consider it the most important comfort and cleanliness element but its satisfaction levels still have plenty of room for growth.

Household Marketshare - Countywide

The incidence of King County households with regular Metro bus riders has continued to drop over the last couple of years, returning to pre-2012 levels. This drop was primarily driven by lower incidences of riders in Seattle/North King County.

**Note that the 2016 rider survey excludes streetcar riders, which were included in previous years.*



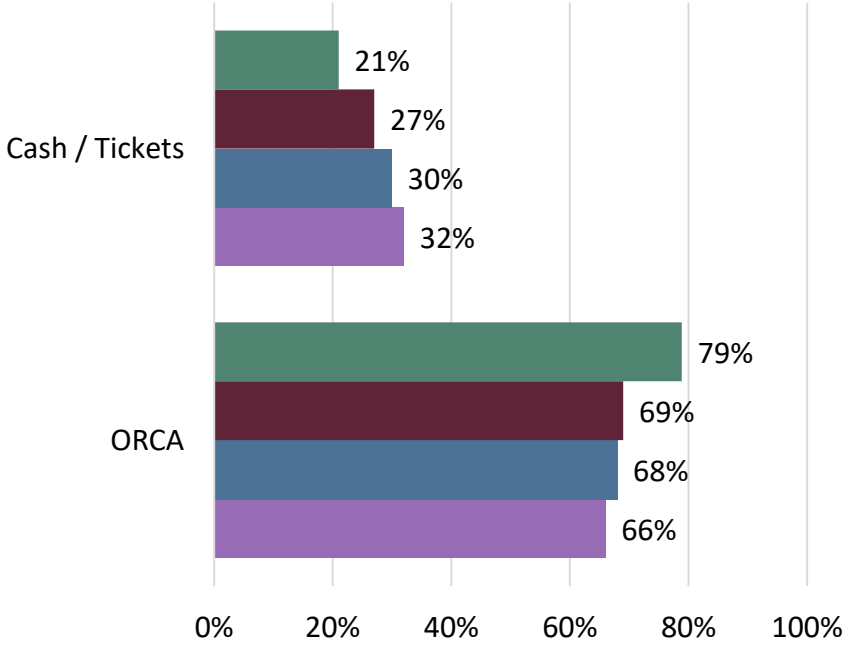
S4B. Including yourself, how many people in your household, 16 years of age or older, have taken **at least five (5)** one-way rides on a **Metro bus** in the last 30 days? A round trip counts as two (2) rides.

S4A. Including yourself, how many people in your household, 16 years of age or older, have taken **between one (1) and four (4)** one-way rides on a **Metro bus** in the last 30 days?

Fare Payment

About three-quarters of riders report using an ORCA card – either purchased by themselves or employers -- as their primary method of fare payment in 2016. This is up from previous years.

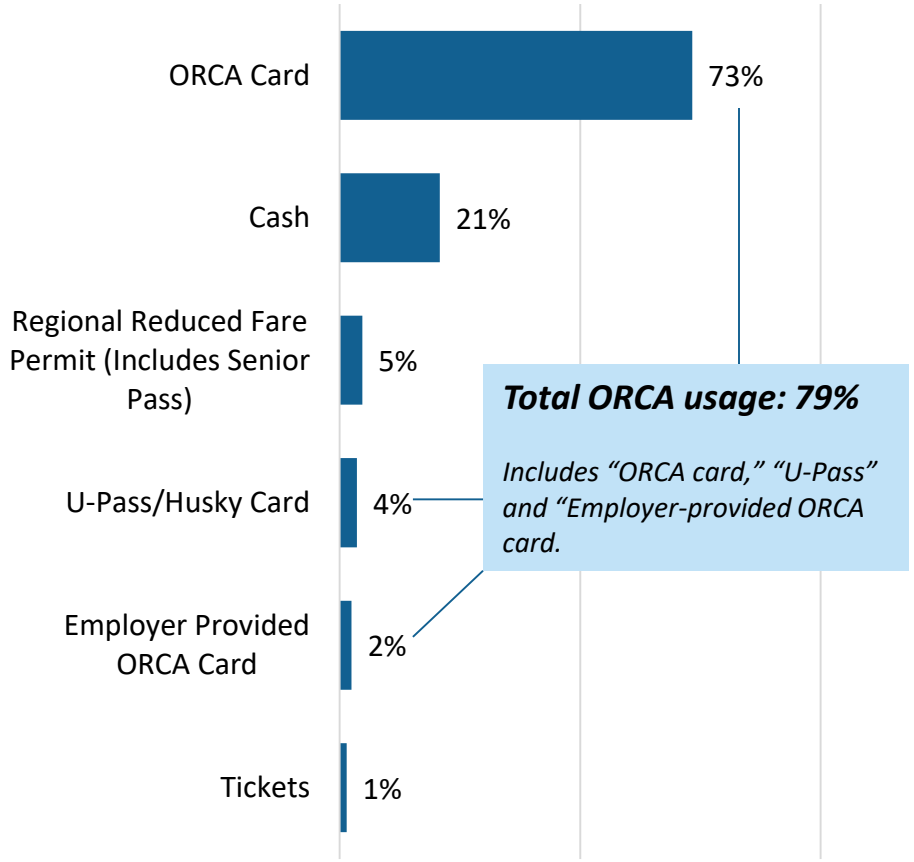
Fare Payment Method over Time



	ORCA	Cash / Tickets
2016	79% ▲	21% ▼
2015	69%	27%
2014	68%	30%
2013	66%	32%

** Note: In 2016, this ORCA category includes the "ORCA card," "U-Pass" and "Employer Provided ORCA card" options.*

Fare Payment Breakdown

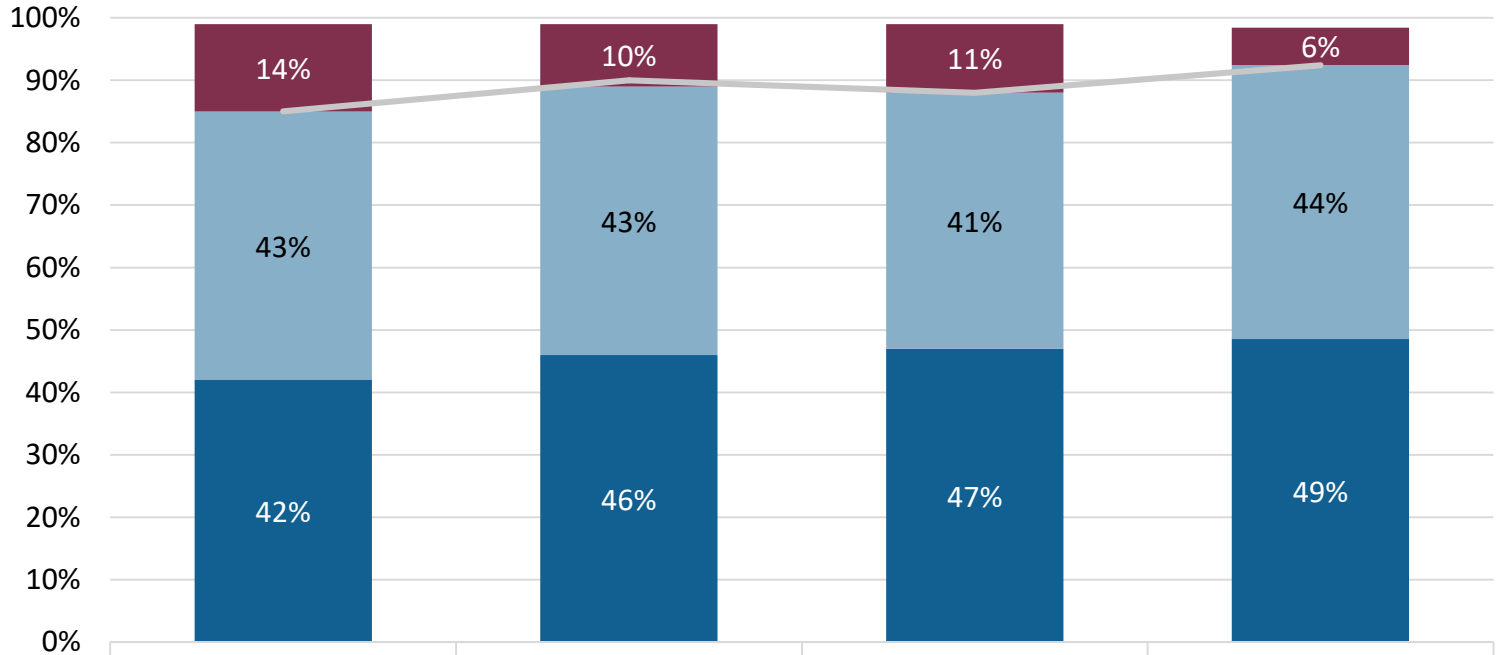


F0. How do you usually pay your bus fare? Do you use an ORCA card, cash, tickets or something else? ***(Multiple Response)***

Overall Satisfaction with Metro – Year-to-Year

There continues to be steady growth in overall rider satisfaction ratings since 2013, as a near-majority of riders are "very satisfied" with the agency. Overall satisfaction (92%) is slightly higher than in previous years and there is notably little dissatisfaction with Metro's bus service, overall.

Overall Satisfaction with Metro

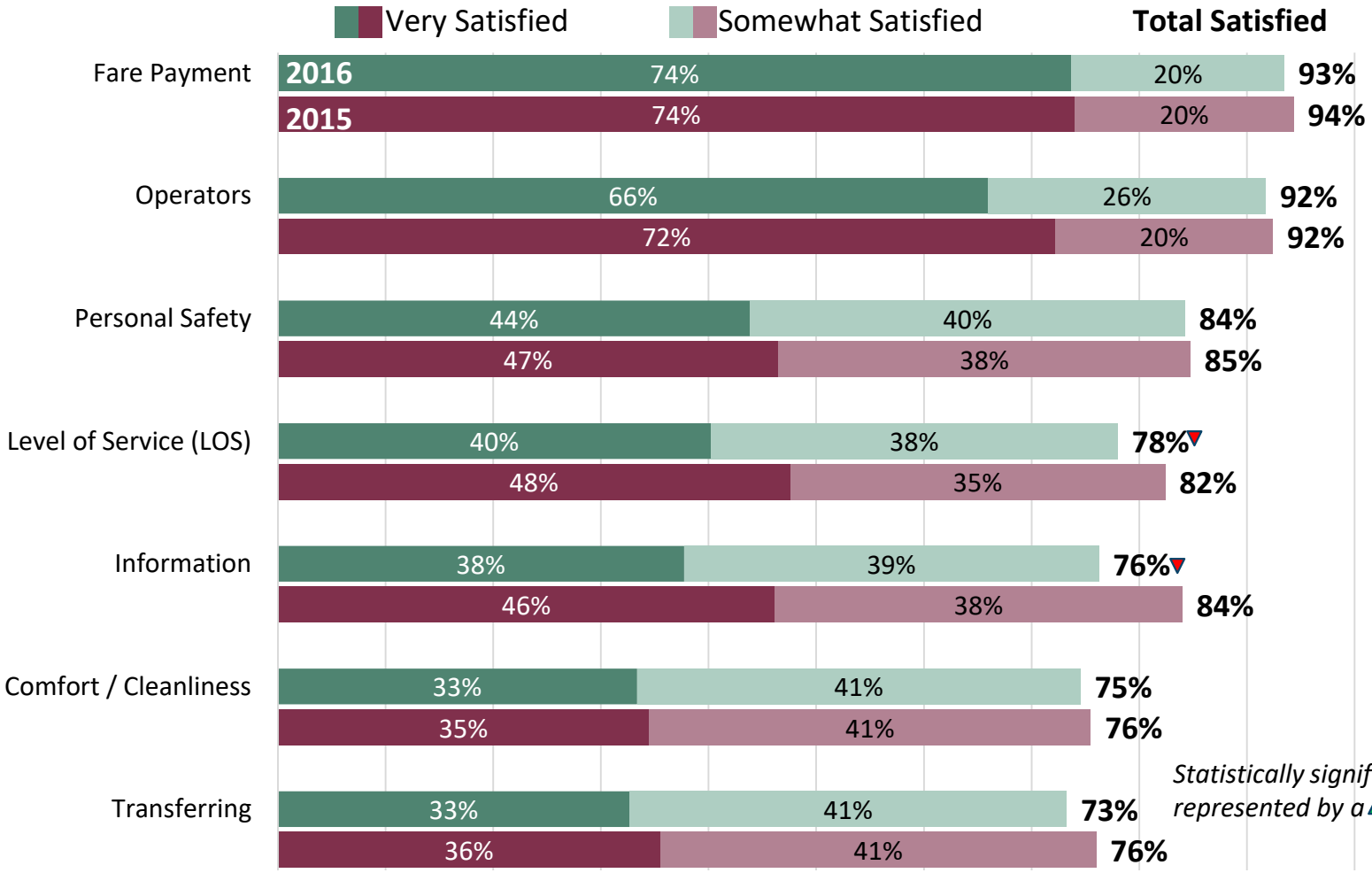


	2013	2014	2015	2016
Dissatisfied	14%	10%	11%	6% ▼
Somewhat Satisfied	43%	43%	41%	44%
Very Satisfied	42%	46%	47%	49%
Total Satisfied	85%	90%	88%	92% ▲

GW1A. Overall, would you say you are satisfied or dissatisfied with Metro?

Aggregate Service Dimension Satisfaction

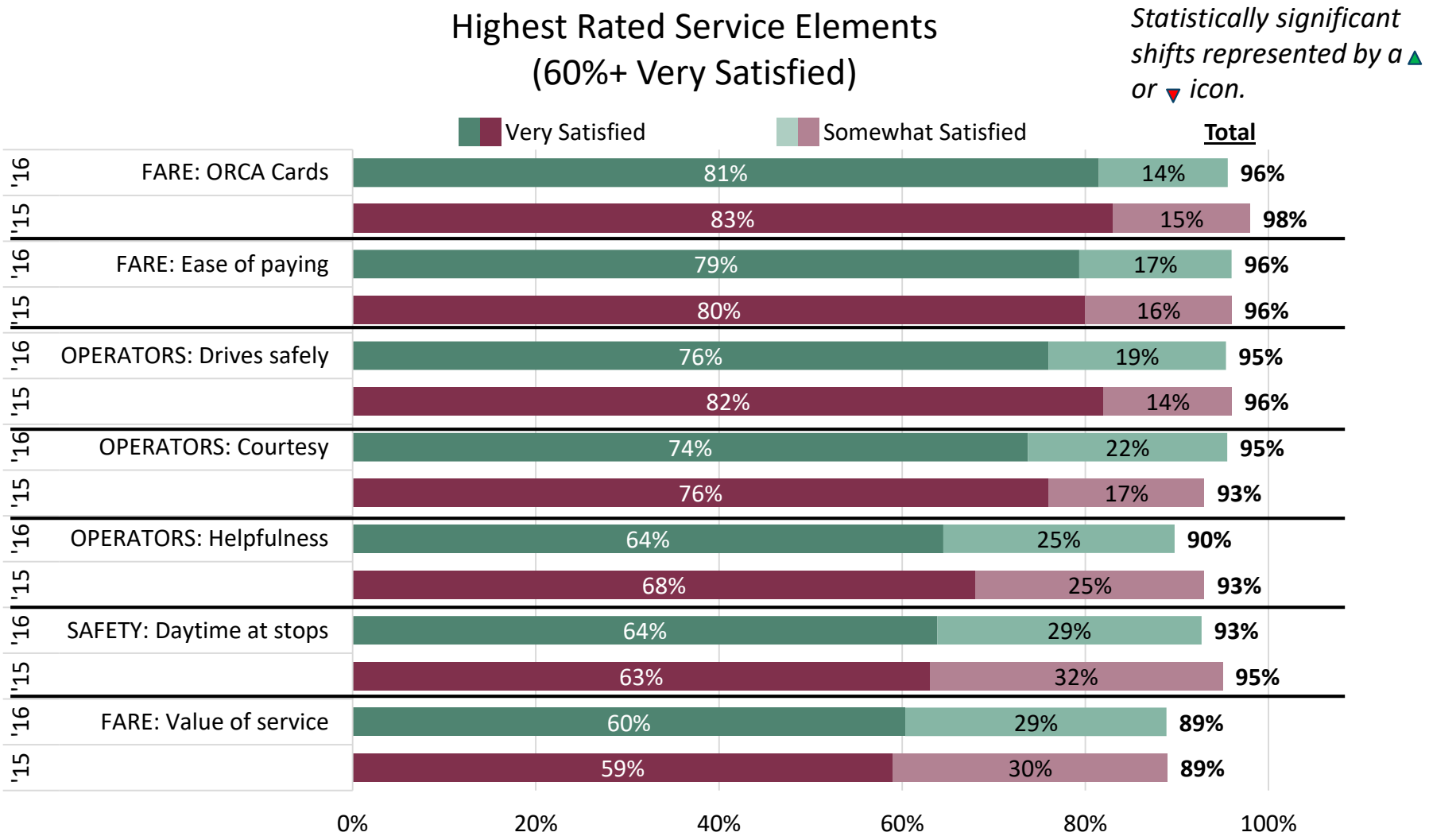
General satisfaction (including "very" and "somewhat satisfied" ratings) is relatively unchanged for most service dimensions, while satisfaction intensity ("very satisfied") is slightly lower in 2016 for the information, operator and level of service dimensions compared to 2015.



NOTE: The 2016 aggregate category ratings use the mean "very satisfied" and "somewhat satisfied" ratings for the individual elements included in each respective service dimension. The aggregated 2015 dimension ratings have been recalculated to include only the elements tested in both 2015 and 2016 versions of the survey.

Individual Element Satisfaction – Highest Rated

Most of 2015's highest-rated service attributes remain the highest rated in 2016. While intensity ("very satisfied") are lower for operators driving safely, overall satisfaction is largely unchanged.

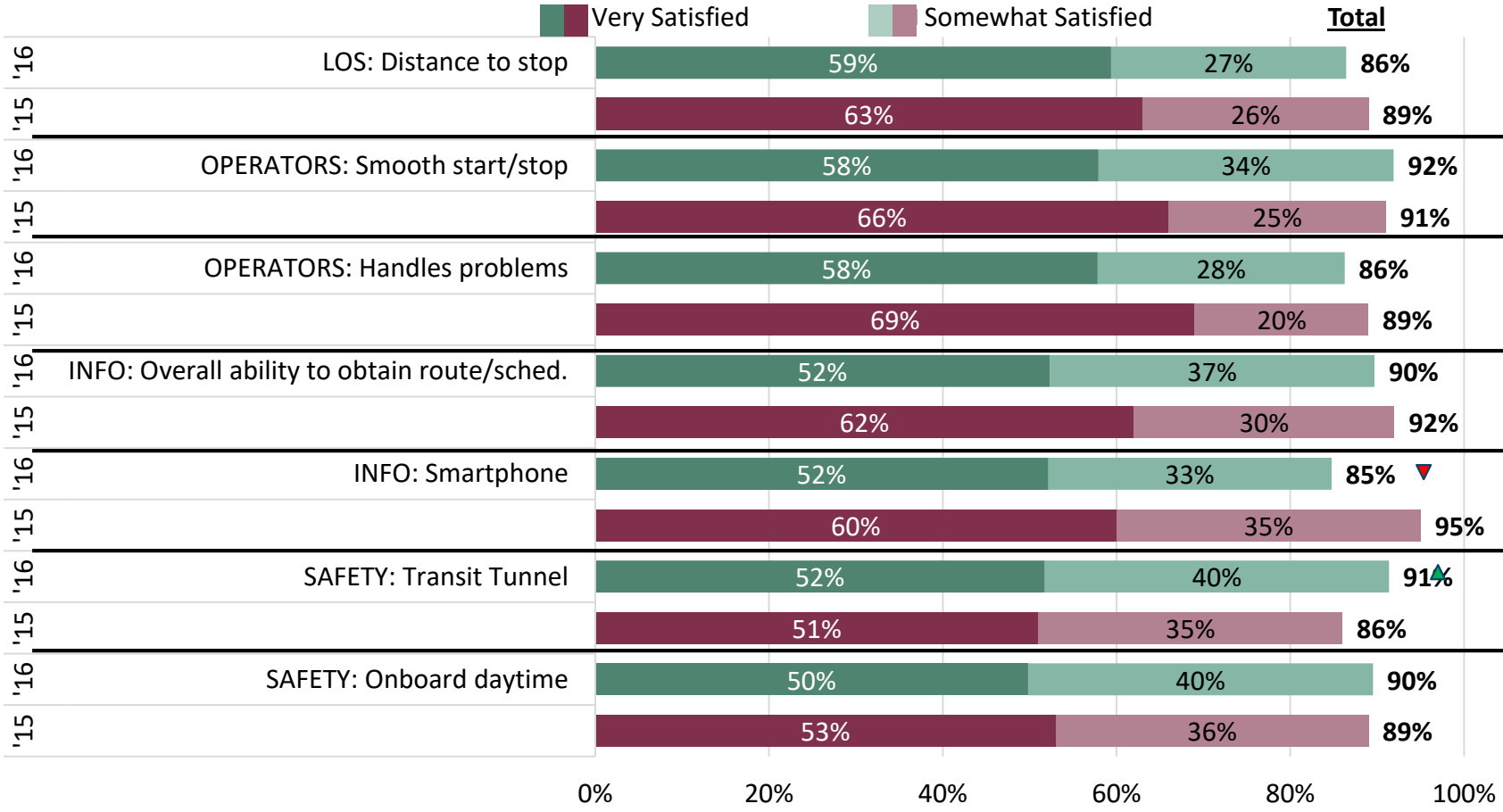


Individual Element Satisfaction – Higher Rated

Several elements – including a couple of the operator ratings and overall ability to get route/schedule information – have decreased in intensity ("very satisfied") but overall satisfaction is on-par with previous years. Satisfaction with info via smartphone has dropped, however.

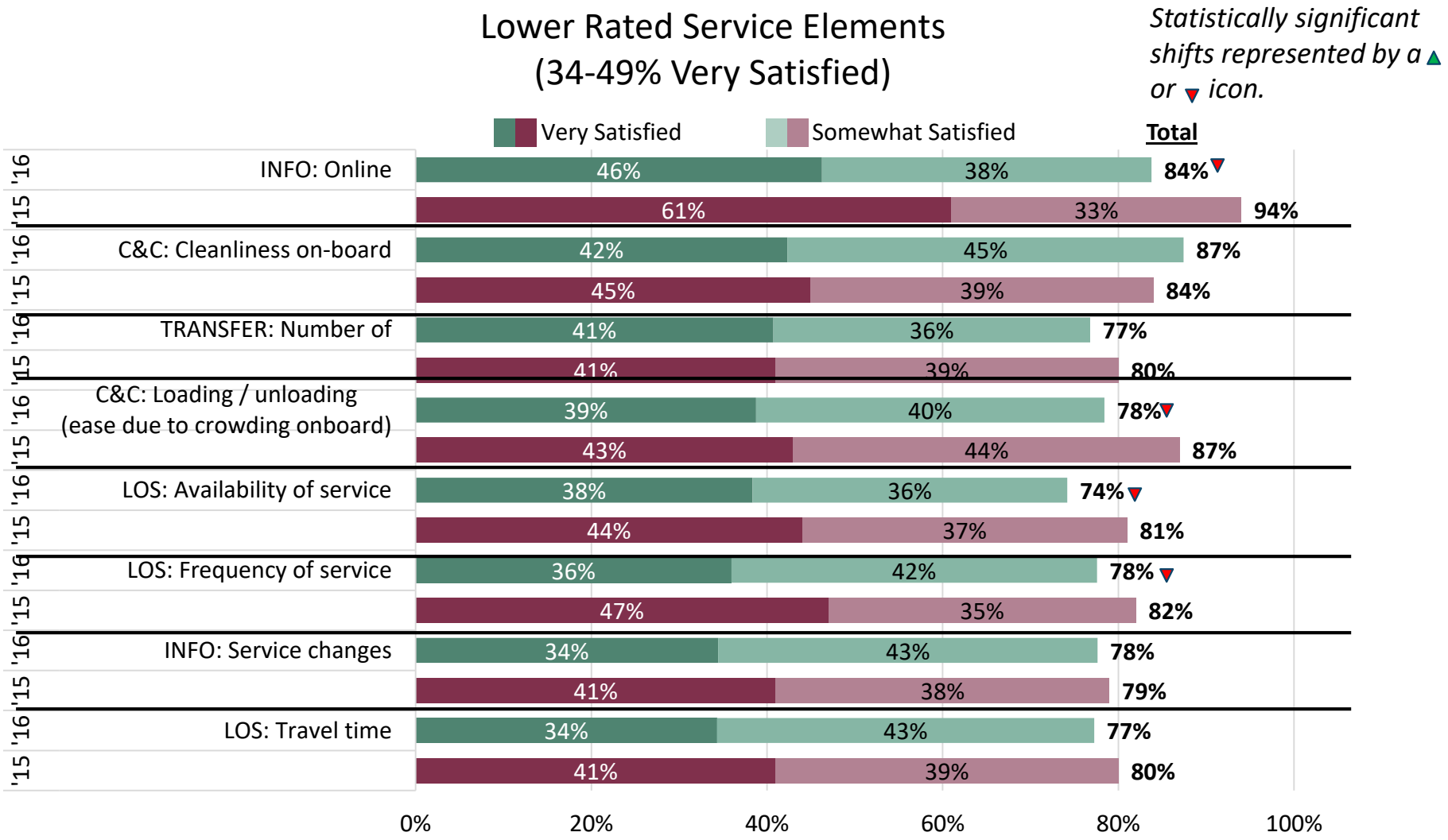
Higher Rated Service Elements (50-60%+ Very Satisfied)

Statistically significant shifts represented by a ▲ or ▼ icon.



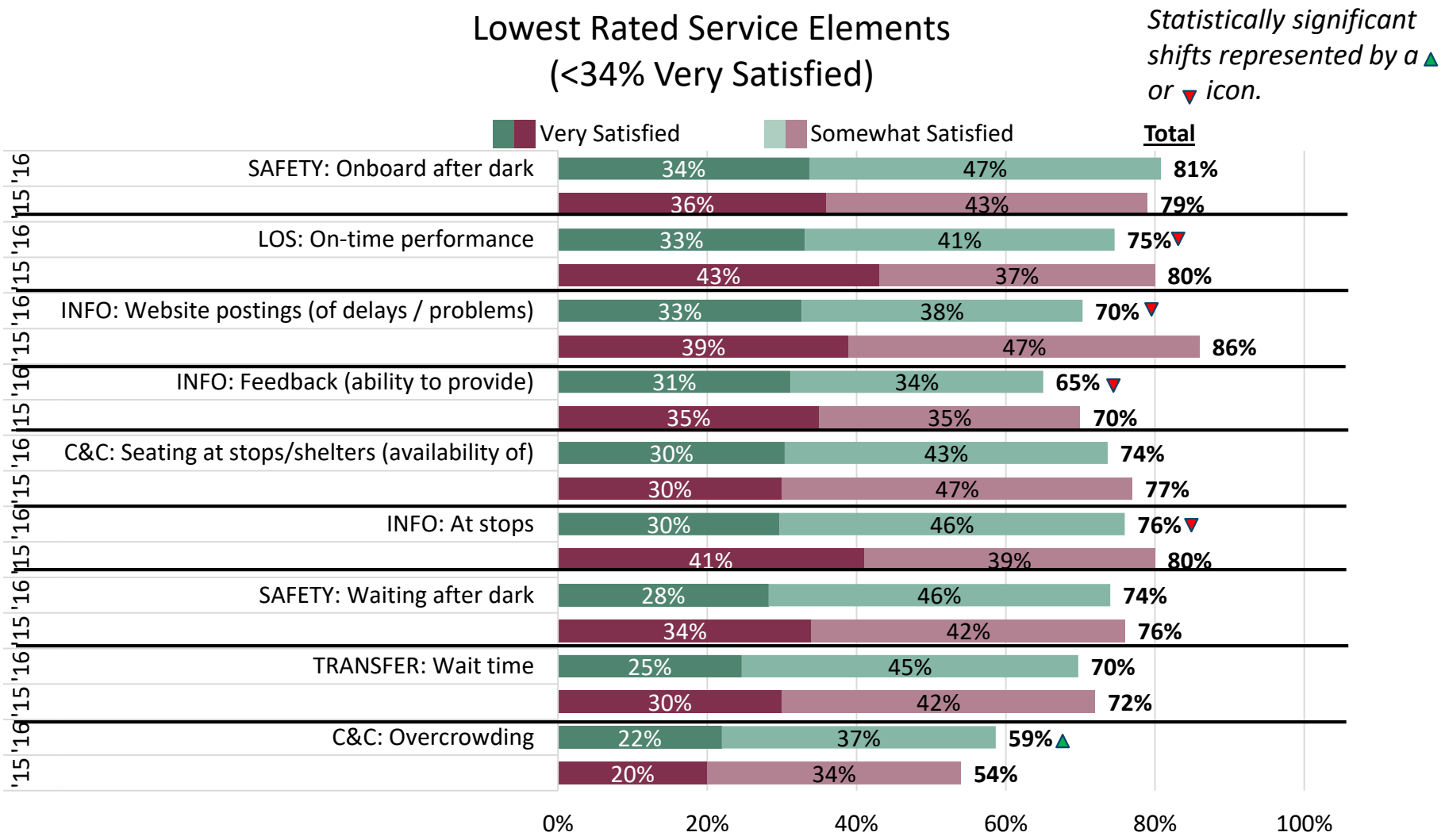
Individual Element Satisfaction – Lower Rated

Satisfaction ratings for the availability of info online, frequency of service, on-time performance, loading/unloading due to crowding, and information at stops have each dropped from 2015.



Individual Element Satisfaction – Lowest Rated

Since 2015, satisfaction with several of the level of service and information-related elements attributes have dropped, both overall and in intensity. Website postings of delays, the ability to give feedback and information at stops are lower year-over-year. On-time performance has also dropped slightly.

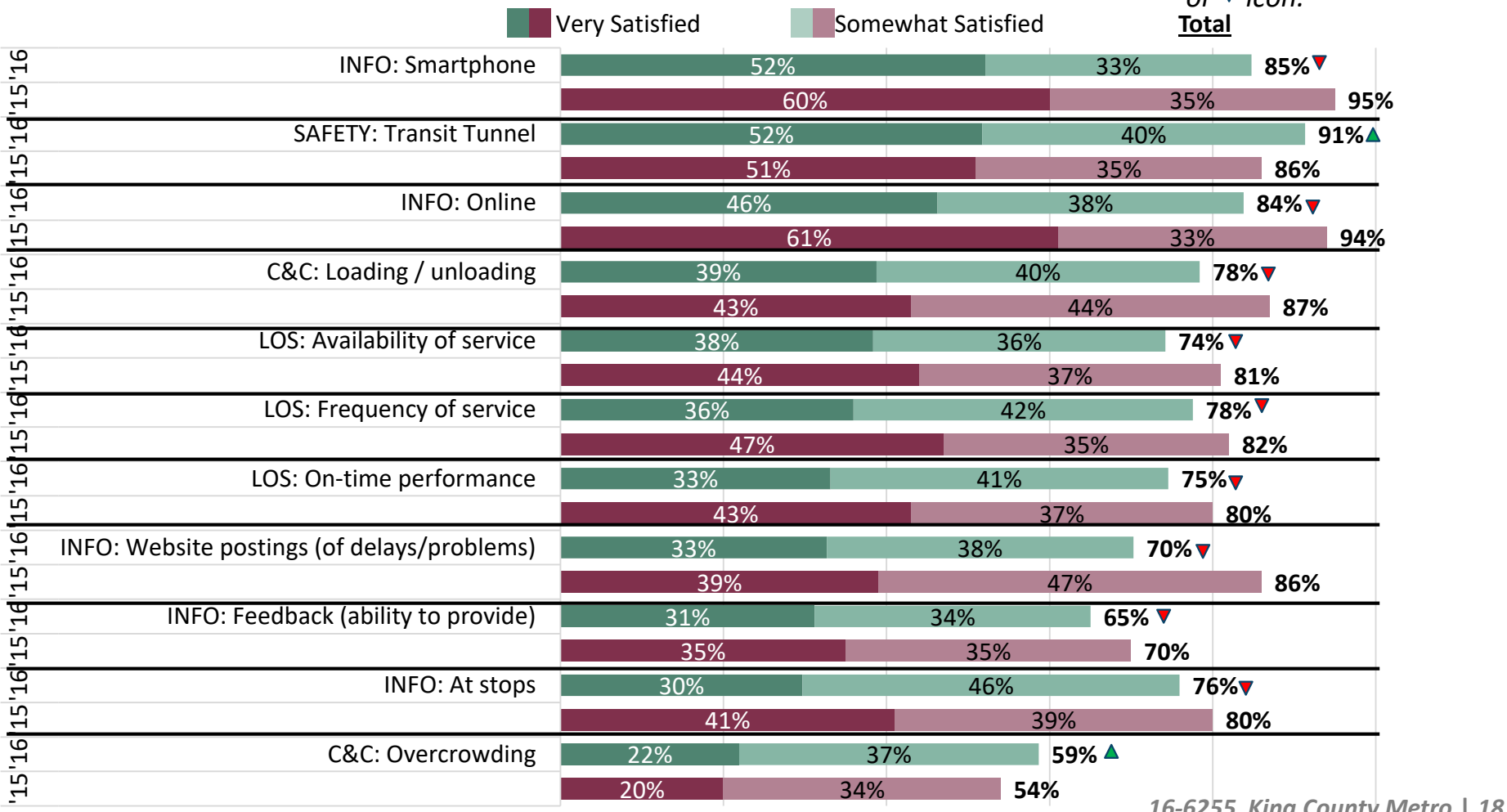


Element Satisfaction – Significant Shifts Only

Web postings of delays (-16% "Satisfied"), online schedules (-10), info via smartphone (-10), and ease of loading/unloading on crowded buses (-9) saw the steepest declines of individual elements from 2015 to 2016. Ratings for safety in the transit tunel (+5%) and overcrowding (+5) both increased.

Service Elements with Significant Shifts in Satisfaction Ratings from 2015 to 2016

Statistically significant shifts represented by a ▲ or ▼ icon.



Key Driver Analysis

A Key Driver Analysis, also referred to as an importance/performance analysis, evaluates the relationships between riders' satisfaction with individual service elements and King County Metro as a whole to identify the most important areas to focus on improving and maintaining.

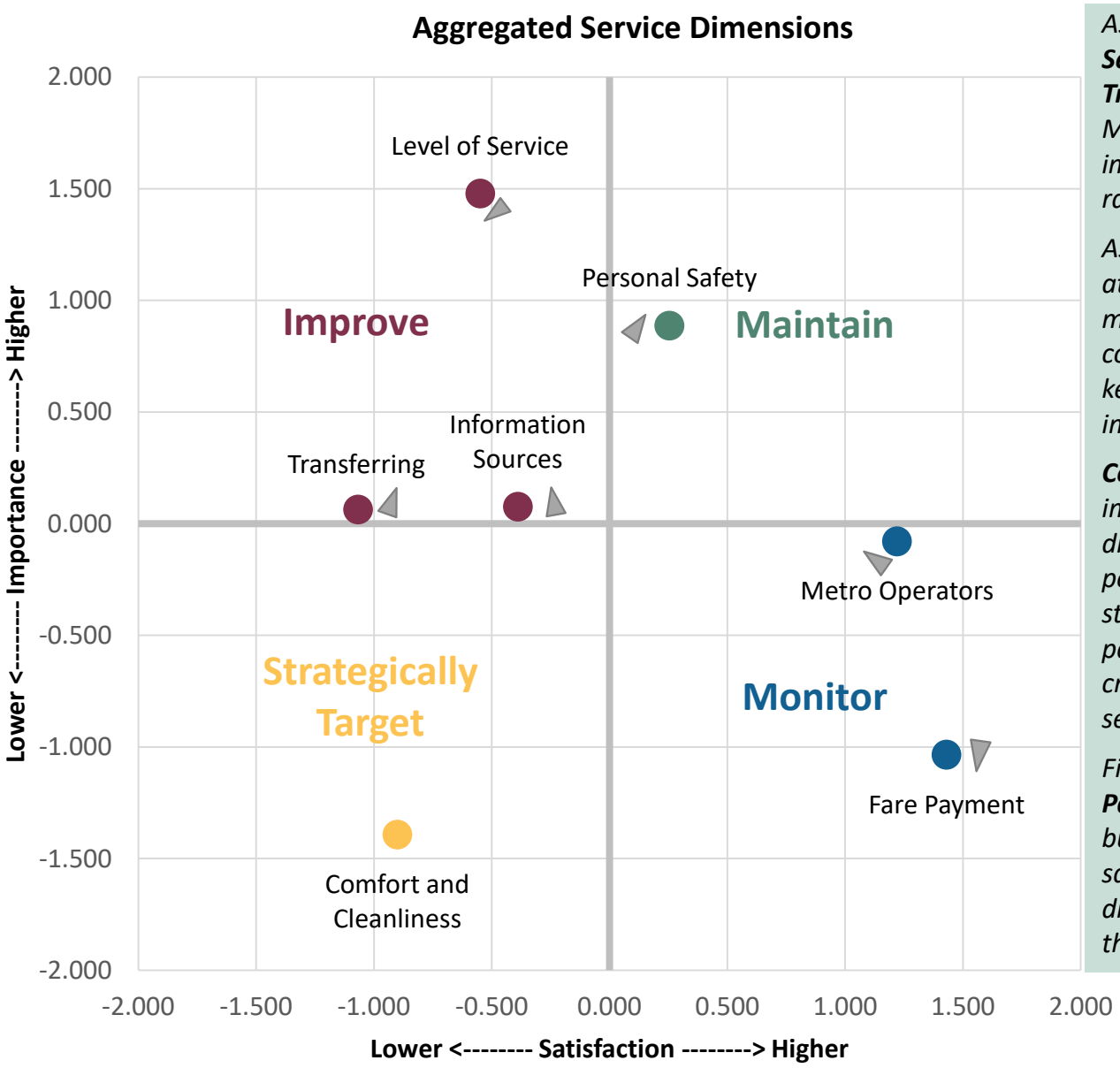
A Key Driver graph plots the results a two-dimensional chart. Each element satisfaction rating is plotted on the graph by its importance to overall agency satisfaction (on the x-axis) and the performance in that area on the y-axis.

This generates four quadrants. The most important is the top-left quadrant. The items plotted here have high importance to riders but their satisfaction in those areas is relatively low. These are the areas where improvements will have the biggest impact and generate the greatest increase in customer satisfaction for the effort.

Service element importance is determined using a regression analysis of the relationship between each element's satisfaction rating and Metro's overall service rating. This analysis helps identify which individual elements have the strongest impact on overall satisfaction with the service. In the following quadrant charts, the relative importance levels are shown vertically, with the more important elements (having a stronger impact on overall satisfaction) appear higher on the chart and less important elements (having a weaker impact on overall satisfaction) appear lower on the chart.

More important and lower rated – Highest priority improvement area	More important and higher rated – Maintain
Less important and lower rated – Strategically Target	Less important but higher rated – Monitor

Key Drivers Analysis – Service Dimensions



*As broader service dimensions, **Level of Service, Information Sources,** and **Transfers** are key improvement areas for Metro. These include many of the most important attributes that are also lower rated.*

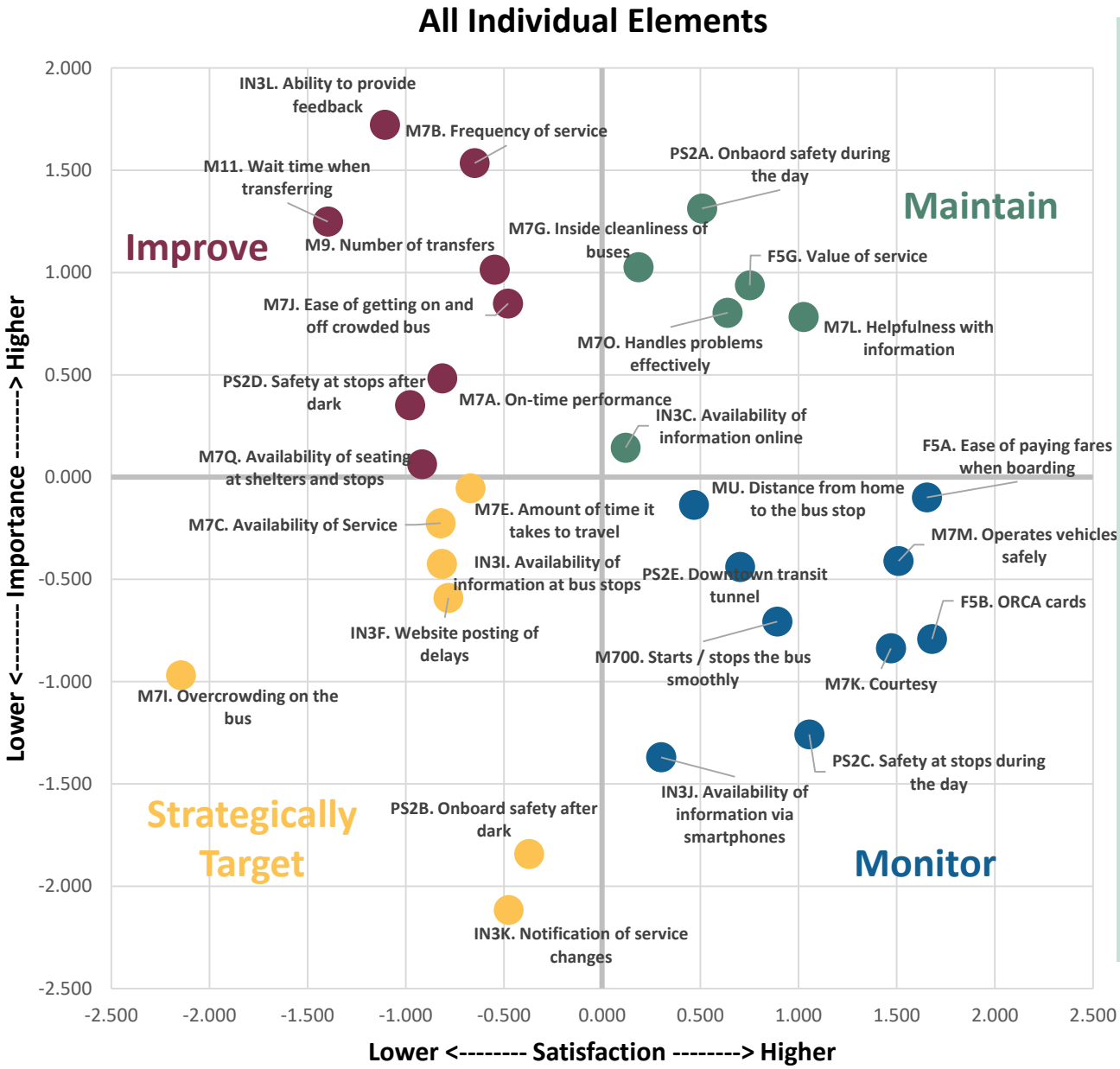
*As the second-most important service attribute, **Personal Safety** is a key maintenance target. Metro should continue to focus efforts on safety to keep it from slipping into the improvement category.*

***Comfort and Cleanliness** is the least important of the broader service dimensions but it's also one of the lowest performing. Metro will want to strategically some of these elements, particularly the ease of getting on/off crowded vehicles and the availability of seating at stops.*

*Finally, Metro's **Operators** and **Fare Payment** are currently the highest rated but also have less bearing on overall satisfaction than other service dimensions. It will be worth tracking these for possible changes in the future.*

**Arrows indicate the approximated directional shift from relative importance/satisfaction position in 2015.*

Key Drivers Analysis – Individual Elements



Comparing all of the individual elements together, Metro will need to focus on a variety of items for immediate improvement. These elements span a variety of service dimensions and include, in order of importance:

1) ***Ability to provide feedback***
2) ***Frequency of service***
3) ***Transfer wait times***
4) ***Number of transfers***
5) ***Ease of getting on/off crowded buses***
6) ***On-time performance***
7) ***Safety of stops after dark***
8) ***Availability of seating at stops***

Additionally, there are some maintenance and strategic target items that are borderline improvement priorities, including ***travel time***, ***availability of service***, ***interior cleanliness*** *and* ***the availability of information online****.*

Key Drivers Analysis – Full Element List

The following table shows the satisfaction ratings and importance rankings, as well as the recommended prioritization strategy for each individual service element within its respective service dimension.

Service Dimensions and Elements	Importance	Very Satisfied %	Mean Satisfaction	Strategy
Level of Service	**1**	**40% (Average)**	**3.92**	**Improve**
Frequency of service	1	36%	3.87	Improve
On-time performance	2	33%	3.81	Improve
Travel time	3	34%	3.86	Strategically Target
Distance to stop	4	59%	4.27	Monitor
Availability of service	5	38%	3.81	Strategically Target
Personal Safety	**2**	**44% (Average)**	**4.19**	**Maintain**
Onboard during the day	1	50%	4.29	Maintain
Waiting at stops after dark	2	28%	3.75	Improve
Downtown transit tunnel	3	52%	4.36	Monitor
Waiting at stops during the day	4	64%	4.49	Monitor
Onboard after dark	5	34%	3.97	Strategically Target
Information Sources	**3**	**38% (Average)**	**3.98**	**Improve**
Ability to provide feedback	1	31%	3.70	Improve
Availability of information online	2	46%	4.15	Maintain
Availability of information at stops	3	30%	3.81	Strategically Target
Website posting of delays	4	33%	3.82	Strategically Target
Availability of information via smartphones	5	52%	4.21	Monitor
Notification of service changes	6	34%	3.93	Strategically Target
Transferring	**4**	**33% (Average)**	**3.75**	**Improve**
Wait time when transferring	1	25%	3.60	Improve
Number of transfers	2	41%	3.91	Improve
Metro Operators	**5**	**66% (Average)**	**4.51**	**Monitor**
Handles problems effectively	1	58%	4.34	Maintain
Helpfulness with information	2	64%	4.48	Maintain
Operates vehicles safely	3	76%	4.65	Monitor
Starts / stops vehicles smoothly	4	58%	4.43	Monitor
Courtesy	5	74%	4.64	Monitor
Fare Payment	**6**	**74% (Average)**	**4.58**	**Monitor**
Value of service	1	60%	4.38	Maintain
Ease of paying fares when boarding	2	79%	4.70	Monitor
ORCA cards	3	81%	4.71	Monitor
Comfort and Cleanliness	**7**	**33% (Average)**	**3.81**	**Strategically Target**
Inside cleanliness of buses	1	42%	4.17	Maintain
Ease of getting on and off crowded bus	2	39%	3.93	Improve
Availability of seating at shelters and stops	3	30%	3.77	Improve
Overcrowding on the bus	4	22%	3.33	Strategically Target